

Income Tax Return Checklist for 2019

INCOME

YES NO

Payment Summaries - Employment
 - Government Benefits
 - Pensions paid

Employment Termination Payment Statement

Statement/s showing any **Interest received**

Dividend statements

Annual Tax Report for distribution from trusts

Overseas income details

Life assurance & friendly society bonus details

Cryptocurrency Transactions

TAX OFFSETS & OTHER ITEMS

HELP/HECS and student loan statements

Spouse's income details

\$ <input type="text"/>	Taxable Income
\$ <input type="text"/>	Reportable Fringe Benefits
\$ <input type="text"/>	Reportable Excess Superannuation
\$ <input type="text"/>	Investment and Rental Losses
\$ <input type="text"/>	Superannuation paid on behalf of spouse

Private Health Insurance Statement:
 showing : rebate allowed,
 : number of days covered
 : membership details

Medical Expenses: Available only for disability aids, attendant care, or aged care if net expenses exceed \$2,377.00 in total

CAPITAL GAINS / LOSSES

Purchase & sale details in relation to rental properties, land, shares, etc.
 * contract dates & settlement statements for both sales & purchases
 * any other costs incurred

Dividend re-investment records (Dates/Costs)

IF PREVIOUS YEAR'S TAX RETURN NOT PREPARED BY OUR PRACTICE

Previous year's Tax return
 Previous year's Tax Office Assessment
 Previous Tax Agents fee (Receipt /Invoice)

DEDUCTIONS (RECEIPTS required)

YES NO

Motor vehicle expenses / Log Book :
 * Odometer readings at 01/07/18 _____
 & 30/06/19 _____

If log book not available No. of klms for work purposes

Personal vehicle details:

* Make & Model _____

* Date of Purchase _____

* Purchase Price \$ _____ * Engine Size _____

* Registration No. _____

Road Tolls and Parking (Not traffic fines)

Work related travel expenses - eg. Fares, Taxi, Car Hire
 Airfares, Accommodation, Meals

Uniforms & protective clothing, dry cleaning, repairs, alterations

Work related study expenses - eg. Fees, Textbooks, Stationary,
 Photocopying, Klms travelled (log book)

Union fees, registrations, professional memberships

Other work related expenses -e.g. Tools, Stationary, Telephone, &
 Seminars, Reference Books, Sun Protection, Computer

Interest & dividend deductions

Income protection insurance

Confirmation statements for deductible superannuation contributions

Gifts & Donations

RENTAL PROPERTIES

No. of weeks available for rent during the year

No. of weeks actually rented

Rental statement/s (from real estate agent) showing income & expenses

Expenses relating to rental property eg. Rates, Insurance, Travel,
 Body Corporate fees, Repairs & maintenance etc.

Loan statements

Additional information if new rental property

\$ Purchase price / Construction cost

Construction date

Copy of purchase/ construction contract

Bank loan approval letter

Settlement Statements from Bank & Solicitor

Date first rented

Refunds are now paid direct to your Bank Account :

B S B No. _____ - _____ (must be 6 digits)

Account No. _____ (up to 9 digits)